

**CLAIMS**

1. A method of analysing software product licence data including the steps of:
  - i) receiving the data from a sales database;
  - 5 ii) collating the data into an analysis database; and
  - iii) displaying an analysis of the data using the analysis database.
- 10 2. A method as claimed in claim 1 wherein the sales database is the database of a software product's vendor.
- 15 3. A method as claimed in any preceding claim wherein the data from the sales database includes transaction data about volume licence sales to customers.
4. A method as claimed in any preceding claim wherein the data includes products lists of available software products.
- 15 5. A method as claimed in any preceding claim wherein the data is received from a vendor sales database in a batch feed.
- 20 6. A method as claimed in claim 5 wherein the batch feed occurs in any one of monthly, bi-weekly, or weekly.
7. A method as claimed in any preceding claim wherein data received from the sales database is cleaned before it is collated into the analysis database.
- 25 8. A method as claimed in claim 7 wherein cleaning the data includes correcting inconsistencies in transaction data or inconsistencies with the existing analysis database.
- 30 9. A method as claimed in any one of claim 7 or 8 when dependent on claim 4 wherein cleaning the data includes determining new products from the product list and updating the analysis database.
10. A method as claimed in any preceding claim including the step of:
  - 35 iv) interacting with the customers of the vendor to obtain correct customer data, other licence data, and actual software installation data.

11. A method as claimed in claim 10 wherein the data obtained in step (iv) is incorporated into the analysis database.
12. A method as claimed in claim 11 wherein step (iv) is performed using the method of claim 47.
13. A method as claimed in any preceding claim wherein the data analysis includes an assessment of licence ownership.
- 10 14. A method as claimed in claim 13 wherein the assessment of licence ownership is displayed for each customer in a summary screen showing products owned by the customer, licences owned for those products by the customer, and a total assessed ownership for each product for the customer.
- 15 15. A method as claimed in claim 14 wherein the summary screen further includes a section showing upgrade licences owned by the customer.
16. A method as claimed in claim 15 wherein the section indicates if additional upgrade licences are required where upgrade licenses have no identifiable base license.
- 20 17. A method as claimed in any one of claims 13 to 16 wherein the display of the assessment of licence ownership includes an option to view a derivations screen showing the derivation of calculations in the summary screen.
- 25 18. A method as claimed in any preceding claim wherein the data analysis includes an assessment of licence compliance.
19. A method as claimed in claim 18 wherein the assessment of licence compliance is displayed for each customer in a summary screen showing (a) products/licences owned by the customer, (b) products actually installed/used by the customer, and the discrepancy between (a) and (b).
- 30 20. A method as claimed in any preceding claim wherein the data analysis includes one or more from the set of transaction data analysis, licence agreement analysis, reseller analysis, customer compliance lists, customer segment

analyses, product analysis, and annuity renewal analysis.

21. A method as claimed in any one of the preceding claims including the step of:
  - v) a user specifying criteria to determine how the data is to be analysed or  
5 what portion of the data is to be analysed;  
wherein step (v) occurs before step (iii).
22. A method as claimed in claim 21 wherein the data analysis is a customer  
compliance list and the criteria includes one or more from the set of designating  
10 the segment of business, assigning risk weightings to one or more factors,  
designation of list order, and a time frame.
23. A method as claimed in claim 21 wherein the data analysis is an annuity  
renewal analysis and the criteria includes one or more from the set of a data  
15 range, types of annuity programs/licences, designation of the segment of  
business, product set, and designation of list order.
24. A method as claimed in any one of the preceding claims wherein the data  
analysis is displayed on a GUI.  
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25. A method as claimed in any one of the preceding claims including the step of:
  - vi) receiving customer data from a vendor CRM database and integrating it  
into the analysis database.
26. A method as claimed in any one of the preceding claims including the step of:
  - vii) transmitting corrected customer data to a vendor CRM database.
27. A method of displaying an analysis of software product licence data including  
the steps of:
  - i) displaying an assessment of the number of computer users in an  
organisation using a first graphical characteristic; and
  - ii) displaying the current number of software product licences owned by  
the organisation for products of a vendor using a second graphical  
characteristic.  
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28. A method as claimed in claim 27 wherein the second graphical characteristic  
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consists of bars representing each product and the first graphical characteristic is a line, perpendicular to the direction of the bars, overlaid on the bars.

29. A method as claimed in claim 28 wherein the bars are colour-coded to indicate  
5 the different types of licenses.
30. A method as claimed in any one of claims 28 to 29 wherein a plurality of  
10 licence types exist for a product that bar may be coded the colour of the numerically dominant licence type and the other licences may be represented as smaller bars overlaid on this bar.
31. A method as claimed in any one of claims 28 to 29 wherein each bar  
15 represents a licence ownership position for the corresponding product for the organisation and the licences are represented as smaller bars overlaid on this bar.
32. A method of displaying a licence ownership position for a vendor's software products for a customer including the steps of:
  - i) retrieving software product licensing data from a sales database;
  - 20 ii) retrieving other software product licence data from the customer;
  - iii) retrieving assessed use of the software products by the customer;
  - iv) calculating a licence ownership position; and
  - v) displaying the licence ownership position and assumptions about calculations in a GUI.  
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33. A method as claimed in claim 32 wherein the licence ownership position is calculated using one or more of the following factors the number/estimated number of computer users in the customer's organisation, the number of commercial licences sold to the customer, the relationship between base  
30 licenses, upgrade licenses, and licences accrued via maintenance contracts, other licences owned by the customer, and various assumptions.
34. A method as claimed in any one of claims 32 to 33 wherein the licence ownership position is calculated by combining different licence types and aggregating purchases totals.  
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35. A method as claimed in any one of claims 32 to 34 wherein the data in steps (i) to (iii) is retrieved from an analysis database created using steps (i) and (ii) of the method of claim 1.
- 5 36. A method as claimed in any one of claims 32 to 35 wherein the sales database is the sales database of the vendor.
- 10 37. A method as claimed in any one of claims 32 to 35 including the step of:
  - vi) calculating and displaying the risk of non-compliance.
- 15 38. A method as claimed in claim 37 wherein step (vi) includes the step of comparing the licence ownership position to actual installation data or actual/estimated computer user data.
- 20 39. A method as claimed in any one of claims 32 to 38 wherein the licence ownership position is recorded and used when later licence ownership positions are calculated.
40. A method as claimed in any one of claims 32 to 39 wherein the licence ownership position may be refined by providing more data or more reliable data.
- 25 41. A method of determining software product licensing schemes for a customer including the steps of:
  - i) retrieving data from an analysis database created during the method of any one of claims 1 to 26;
  - ii) retrieving customer requirement data; and
  - iii) calculating possible licence schemes.
- 30 42. A method as claimed in claim 41 wherein the data retrieved from the analysis database includes current compliance or non-compliance with licensing schemes by the customer, and data about existing software product licences owned by the customer.
- 35 43. A method as claimed in any one of claims 41 to 42 wherein the customer requirement data includes intended deployment of software products over a

specified time and "soft cost" data relating to administration costs of certain types of licensing schemes.

44. A method as claimed in any one of claims 41 to 43 wherein the licence schemes include total costs, annual costs, and net-present-value considerations.
45. A method as claimed in any one of claims 41 to 44 includes the step of:
  - iv) displaying a graphical comparison of the licence schemes.
46. A method as claimed in any one of claims 41 to 44 including the step of selecting the best possible or most appropriate licensing schemes for the customer.
47. A method of recording customer data including the steps of:
  - i) prompting questions to ask a customer;
  - ii) recording the responses given by the customer; and
  - iii) integrating the responses into an analysis database created during the method of any one of claims 1 to 26.
48. A method as claimed in claim 47 wherein the questions include questions relating to software users within the customer's organisation and general details about the organisation, and questions designed to assist the capture of anecdotal information about product use, user counts, and non-volume licence purchases.
49. A method as claimed in any one of claim 47 to 48 wherein the types of questions prompted may be determined by the lack of certain data, the existence of certain data, or the reliability of certain data within the analysis database.
50. A method as claimed in any one of claims 47 to 49 wherein the responses recorded automatically update the analysis database and further questions may be based on responses previously supplied.
51. A method as claimed in any one of claims 47 to 50 including the step of

retrieving compliance/non-compliance data from the analysis database.

52. A method as claimed in claim 51 wherein the data may be used to direct the focus of the questions prompted.

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53. A method as claimed in any one of claims 47 to 52 wherein the questions are asked during a calling campaign.

10 54. A method as claimed in any one of claims 47 to 53 wherein the responses are integrated into a campaign table within the analysis database.

55. A method for selecting a software product of a vendor including the sequentially occurring steps of:

15 i) displaying a plurality of panes within a GUI;  
ii) selecting a product type from a list of product types under category headings within a first pane;  
iii) selecting a product variation from a list of product variations within a second pane; and  
iv) selecting a product version from a list of product versions within a third pane.

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56. A method as claimed in claim 55 wherein the software products comply with MICROSOFT™ labelling methodology.

25 57. A method as claimed in any one of claims 55 to 56 wherein the first pane lists the vendor's most popular product types under each category.

58. A method as claimed in claim 57 wherein the category headings under the first pane include "Applications", "Servers", and "Systems".

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59. A method as claimed in any one of claims 55 to 58 including the step of selecting a licence type of the software product within the third pane.

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60. A method as claimed in any one of claims 55 to 59 wherein the selection of a product type within the first pane determines the product variations listed in the second pane.

61. A method as claimed in any one of claims 55 to 60 wherein selection of the product type is confirmed by actuation of a button within the first pane.
- 5 62. A method as claimed in any one of claims 55 to 61 wherein the selection of a product variation within the second pane determines the product versions listed in the third pane.
- 10 63. A method as claimed in any one of claims 55 to 62 wherein selection of the product variation is confirmed by actuation of a button within the second pane.
- 15 64. A method as claimed in any one of claims 55 to 63 wherein the method is used to record or update actual installation data of the software product in a customer's organisation.
- 20 65. A method for linking two company names including the steps of:
  - i) entering a first company name abbreviation in a first region;
  - ii) populating a first list within a second region with company names which correspond to the first company name abbreviation;
  - iii) selecting a first company name from the list;
  - iv) entering a second company name abbreviation in a third region;
  - v) populating a second list within a fourth region of company names which correspond to the second company name abbreviation;
  - vi) selecting a second company name from the second list; and
  - vii) linking the first company name with the second company name.
- 25 66. A method as claimed in claim 65 wherein the company names are linked because the first company name is the parent or child of the second company name, the first company name is the former or present name of the second company name, or the first company name is an alternative name of the second company name.
- 30 67. A method as claimed in any one of claim 65 to 66 wherein the first and second company name abbreviations may be a search string for a part of a company name.
- 35 68. A method as claimed in any one of claim 65 to 67 wherein the first and second

lists include the company name and its link status.'

69. A method as claimed in claim 68 wherein the link status is any one of the set of  
not linked, a parent, and a child.  
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70. A method for displaying linked company names including the steps of:
  - i) displaying a list of one or more primary company names;
  - ii) displaying under each primary company name one or more secondary  
company names linked to the primary company name; and  
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  - iii) displaying one or more graphical characteristics each representing the  
link between each secondary company name and its corresponding  
primary company name.
71. A method as claimed in claim 70 wherein the company names are linked  
15 because the primary company name is the parent of the secondary company  
name, the secondary company name is the former name of the primary  
company name, or the secondary company name is an alternative name of the  
primary company name.
- 20 72. A method as claimed in any one claims 70 to 71 wherein the secondary  
company is displayed under and indented with respect to the primary company  
name.
73. A method as claimed in any one claims 70 to 72 including the step of  
25 displaying one or more tertiary company names each linked to a secondary  
company name under their respective secondary company names and one or  
more graphical characteristics representing each link.
74. A method as claimed in any one of claims 70 to 73 wherein the graphical  
30 characteristics used to represent the link are "L-shaped" branches.
75. A system for implementing the method of any one of the preceding claims.
76. Software for effecting method or system of any one of the preceding claims.